



# JOHANNA FOX TURNER

CPA, CFP<sup>®</sup>, RLP<sup>®</sup>

SENIOR PARTNER

## CONTACT



270.247.0555



Johanna@FoxWealthMgmt.com



907 Paris Road, Suite B  
Mayfield, KY 42066

2920 Lone Oak Road, Suite 4  
Paducah, KY 42003



www.FoxWealthMgmt.com

## EDUCATION

BACHELORS OF SCIENCE  
Accounting  
Lipscomb University  
1979

## LICENSES

Certified Public Accountant  
Tennessee — 1979  
Kentucky — 1988

Certified Financial Planner™ — 2007  
Series 65 — 2007  
Kentucky, Tennessee, Florida  
Registered Life Planner<sup>®</sup> — 2009

## PROFESSIONAL ASSOCIATIONS

National Association of Personal  
Financial Planners  
Financial Planning Association



## PROFILE

*Johanna Fox Turner passed both the Certified Public Accountant exam (1979) and the CERTIFIED FINANCIAL PLANNER™ exam (2006) in her first sittings. She is among only 23% of CERTIFIED FINANCIAL PLANNER™ who are women.*

*Johanna has been a CPA and entrepreneur for over 30 years. She chose to become a Fee-Only financial planner to give clients an option for competent, ethical financial planning and investment management. Johanna opened the doors to Fox & Company Wealth Management on August 1, 2008 and is one of only three Registered Life Planners (RLP<sup>®</sup>) in Kentucky and Tennessee. She lives in Mayfield, KY with her husband, Bob, a successful entrepreneur and their miniature Australian Shepherd, Beau (who is in charge of office security). She has two married sons and four grandchildren.*

## EXPERIENCE

Johanna has worked as a Certified Public Accountant since passing the CPA exam, most of that time as owner of Fox & Co, CPAs, Inc., where she concentrates on finance, tax, and consulting with entrepreneurs. She and her business partner, Michelle Neiswender, MBA, CFP<sup>®</sup> serve clients nationwide and in Mexico.

Johanna's vision for Fox & Co. Wealth Management was to build a commission-free planning and investment practice based upon a simple, transparent cost model. She has had no complaints filed against her or her businesses in her 35 years as a professional.

Specialties include:

- Majority/managing owner of Fox & Co., CPAs and Fox & Co. Wealth Management
- Estate planning, trusts, business consulting, succession planning, tax planning
- Consultant to HNW individual investors and business owners
- Experience in family negotiations (estate and trusts, business succession, gifting)
- Financial author and speaker widely quoted in [regional and national publications](#).
- Continuing Education Instructor — Finance

## COMMUNITY

Member, His House Ministries Church, Mayfield, KY  
Four Rivers Business Journal, Monthly Financial Planning Columnist  
YMCA, Board Member, Treasurer  
Mayfield-Graves County Chamber of Commerce, Mayfield KY, past President  
W KY Regional Chamber Alliance, Charter Member, past Treasurer/Finance Committee Chair  
Treasurer, Teresa Cantrell for Mayor of Mayfield (successful campaign 2010 and 2014)  
Graves County Republican Party, past Chairman  
2004 Republican National Convention, Alternate Delegate  
Mayfield City Council, past Councilwoman (two terms)  
BNI (Business Networking International), Paducah KY, charter member, past Vice President